SFA Modernization Partner

United States Department of Education
Student Financial Assistance

Data Mart Integration Framework Sequencing & Communication Plan

Task Order 71
Deliverable 71.1.1

September 21, 2001

Contents

Background

SFA has three operating data marts – the Chief Financial Office (CFO) data mart, the Financial Partners (FP) data mart, and the Delinquent Loans (DL) data mart. While all three marts are independently successful, they are standalone and disconnected. There are many marts that are planned over the next two years, which could all be standalones without proper enterprise design and standards.

This project will offer a design or framework to connect and integrate the standalone marts, both for the current data marts and the ones to come. The framework will also set enterprise design standards – a result of collaboration between the project team and current data mart owners – to help advance consistency across marts.

About this Deliverable
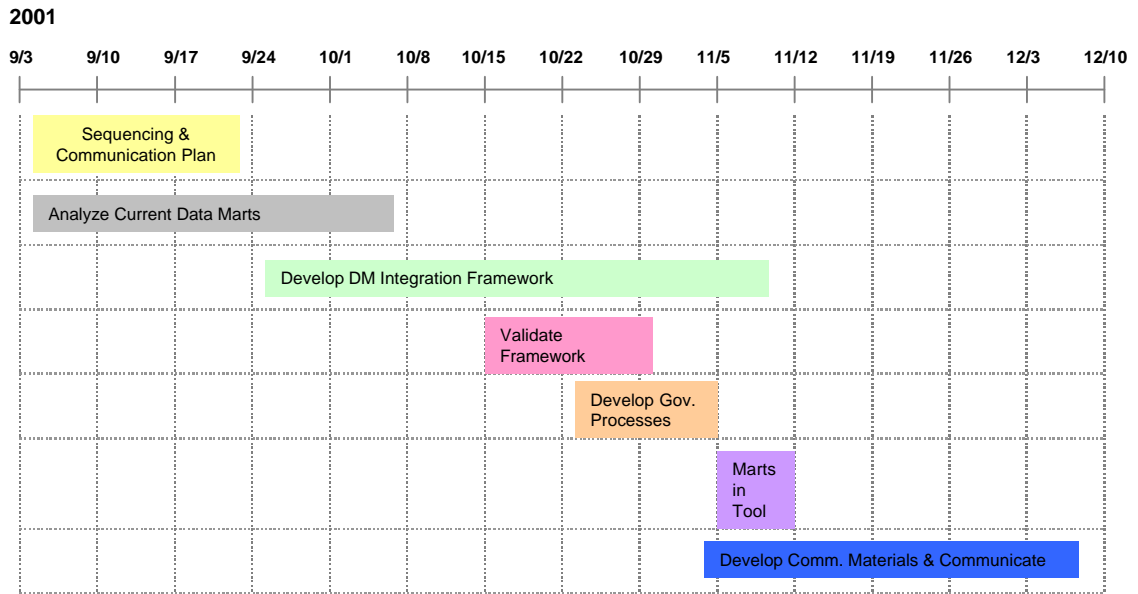This is the first of three project deliverables, and presents an integrated plan, with the following components:

♦ ***Sequencing Plan*** – this plan shows the current and planned data mart projects, and when our deliverables will begin adding value to those projects. This can help foster a common understanding of the context and the value of this project.

♦ ***Project Timeline*** – a snapshot view of this project's key milestones

♦ ***Project Plan*** – a detailed project plan from which we can manage this project and report progress. This plan incorporates communication events from the communication plan, with due dates.

♦ ***Communication Plan*** – a plan that can help us communicate more effectively with data mart owners and stakeholders so that the framework will be used for mart integration. The communication plan includes the communication event, the vehicle, the audience, the purpose, who will develop the communication materials, and who will present or communicate. It also has a cross reference into the Project Plan. It is important to note that there is separate set of activities to develop communication materials as we execute this plan.

Sequencing Plan
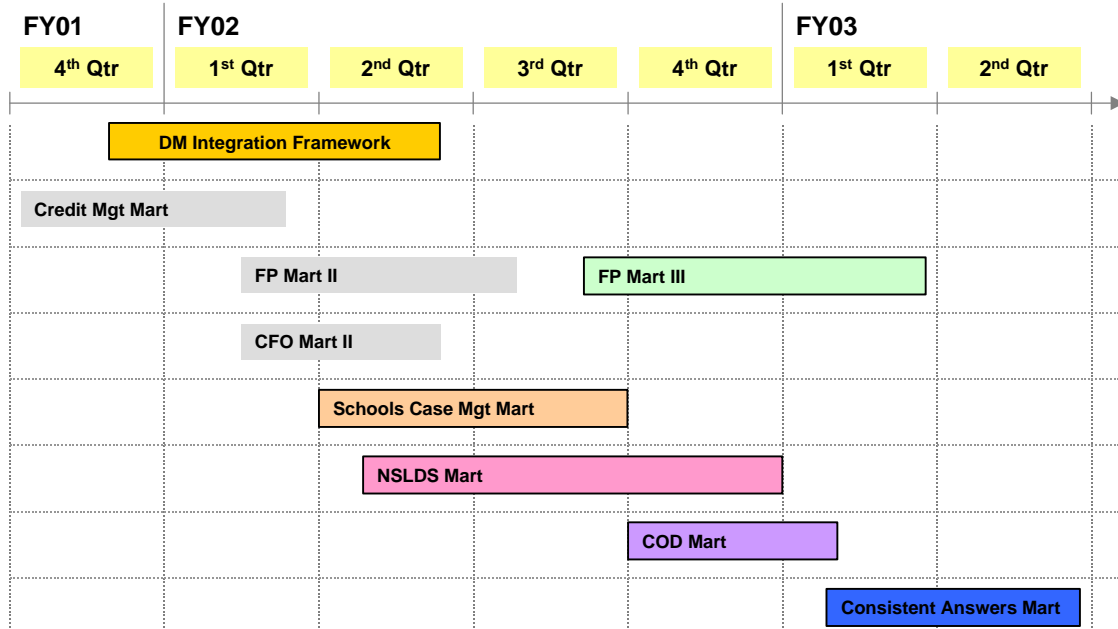
The Sequencing Plan above lays out planned or anticipated data marts for FY02 and FY03. The data mart projects in the light gray color may need to make changes to their design based on the integration framework design, as they will be ahead of the data mart integration framework. The framework will be completed and ready for use in the FP III, Schools Case Management, NSLDS, COD and Consistent Answers marts.

Project Timeline

2001

9/3	9/10	9/17	9/24	10/1	10/8	10/15	10/22	10/29	11/5	11/12	11/19	11/26	12/3	12/10

Sequencing & Communication Plan

Analyze Current Data Marts

Develop DM Integration Framework

Validate Framework

Develop Gov. Processes

Marts in Tool

Develop Comm. Materials & Communicate

This timeline is a high-level view of the detailed plan on the next page. This is intended as a communication vehicle for those who are not part of the project team.

Project Plan

	Task	Start	Finish	Duration
1	**Planning Phase**	**9/4**	**9/21**	**14 days**
2	Develop Sequencing Plan-draft	9/4	9/18	
3	Develop Communication Plan-draft	9/4	9/18	
4	Finalize Sequence & Communication Plans	9/19	9/21	
5	Milestone - Deliver Sequence & Communication Plan	9/21	9/21	
7	**Design & Development Phase**	**9/4**	**11/9**	**49 days**
8	**Analyze Current Data Marts**	**9/4**	**10/5**	
9	Install & Access Rational Rose Tool	9/14	9/14	
10	*E-mail Project Kickoff Invitation*	*10/4*	*10/4*	
11	*Hold Project Kickoff*	*10/11*	*10/11*	
12	CFO Mart Analysis	9/4	10/5	
13	DL Mart Analysis	9/4	10/5	
14	FP Mart Analysis	9/4	10/5	
15				
16	**Develop Data Mart Integration Framework**	**9/25**	**11/9**	
17	Develop Draft DM Integration Framework (High-level Dimensions Only)	9/25	10/23	
18	Capture New Standardized Dimensions in Rational Tool	9/25	10/23	
19	Develop Draft Data Population Architecture	9/25	10/23	
20				
21	**Validate Framework with Users**	**10/15**	**10/30**	
22	*E-mail Validation Meetings Invitation*	*10/15*	*10/15*	
23	*Prepare Mod Partner Newsletter Communication (for October)*	*10/15*	*10/15*	
24				
25	**CFO Mart**	**10/24**	**10/24**	
26	*Conduct Validation Meeting*	*10/24*	*10/24*	
27	Hold Design Review Meeting	10/24	10/24	
28	**DL Mart**	**10/25**	**10/25**	
29	*Conduct Validation Meeting*	*10/25*	*10/25*	
30	Hold Design Review Meeting	10/25	10/25	
31	**FP Mart**	**10/29**	**10/29**	
32	*Conduct Validation Meeting*	*10/29*	*10/29*	
33	Hold Design Review Meeting	10/29	10/29	
34	**Credit Management Mart**	**10/30**	**10/30**	
35	*Conduct Validation Meeting*	*10/30*	*10/30*	
36	Hold Design Review Meeting	10/30	10/30	
37				
38	Revise/Finalize Framework Design	10/31	11/5	
39				
40	**Develop Governance/Review Processes**	**10/24**	**11/5**	
41	Develop Draft Processes	10/24	10/30	
42	Finalize Processes	10/31	11/5	
43				
44	**Capture As-Is Data Mart Entities & Attributes**	**11/6**	**11/9**	
45	Capture CFO Mart	11/6	11/6	
46	Capture DL Mart	11/7	11/7	
47	Capture FP Mart	11/8	11/9	
48	Capture FARS(SCMDM) Mart	11/6	11/9	
49	Milestone - Deliver Data Mart Integration Framework, 2001	11/9	11/9	
51	**Deployment Phase**	**11/2**	**12/6**	**24 days**
52	*Set Date for Management Council Presentation*	*11/2*	*11/2*	
53	*Develop Mod Partner Newsletter Communication (for November)*	*11/15*	*11/15*	
54	*Develop SFA In-Step Communication*	*11/15*	*11/15*	
55	Develop Management Council Presentation	11/12	11/22	
56	*Hold Presentation w/ Management Council*	*11/23*	*11/23*	
57	*E-mail Final Briefing Invitation*	*11/23*	*11/23*	
58	Develop Briefing Packet	11/26	11/30	
59	Finalize Briefing Packet	12/3	12/5	
60	*Hold Final Briefing Meeting*	*12/6*	*12/6*	
61	Milestone - Project Completion, Deliver Commuication Materials	12/6	12/6	

Communication Plan

The communication plan below is a series of communication events that will help ensure that the data mart owners and other stakeholders know about the data mart integration project, and are involved in shaping the framework design.

<u>Event: Project Kickoff Invitation</u>

Vehicle:	Email
Audience:	SFA and Modernization Partner teams
Purpose:	- Announce project kickoff meeting
	- Deliver meeting agenda
	- Encourage participation
Developer:	SFA
Presenter:	N/a
Due Date:	10/4/01
Project Plan Line #:	10

<u>Event: Project Kickoff Meeting</u>

Vehicle:	Meeting
Audience:	SFA and Modernization Partner teams
Purpose:	Share goals, plans, approach, and roles/responsibilities
Developer:	Modernization Partner
Presenter:	SFA and Modernization Partner Team Leads
Due Date:	10/11/01
Project Plan Line #:	11

<u>Event: Validation Meetings Invitation to CFO Mart Owners</u>

Vehicle:	Email
Audience:	CFO Data Mart Owners
Purpose:	- Announce integration framework validation meeting
	- Encourage CFO Data Mart owner participation
Developer:	Modernization Partner
Presenter:	SFA and Mod Partner Team Leads
Due Date:	10/15/01
Project Plan Line #:	22

Event: Validation Meetings Invitation to DL Data Mart Owners

Vehicle:	Email
Audience:	DL Data Mart Owners
Purpose:	- Announce integration framework validation meeting
	- Encourage CFO Data Mart owner participation
Developer:	Modernization Partner
Presenter:	SFA and Mod Partner Team Leads
Due Date:	10/15/01
Project Plan Line #:	22

Event: Validation Meetings Invitation to FP Data Mart Owners

Vehicle:	Email
Audience:	FP Data Mart Owners
Purpose:	- Announce integration framework validation meeting
	- Encourage CFO Data Mart owner participation
Developer:	Modernization Partner
Presenter:	SFA and Mod Partner Team Leads
Due Date:	10/15/01
Project Plan Line #:	22

Event: Validation Meetings Invitation to Credit Mgt Data Mart Owners

Vehicle:	Email
Audience:	Credit Management Data Mart Owners
Purpose:	- Announce integration framework validation meeting
	- Encourage CFO Data Mart owner participation
Developer:	Modernization Partner
Presenter:	SFA and Mod Partner Team Leads
Due Date:	10/15/01
Project Plan Line #:	22

Event: Modernization Partner Newsletter (for October)

Vehicle:	Project write-up briefing
Audience:	Modernization Partner
Purpose:	- Communicate project solution to mod partner teams
Developer:	Modernization Partner
Presenter:	N/A
Due Date:	10/15/01
Project Plan Line #:	23

Event: Validation Meeting w/ CFO Data Mart Owners

Vehicle:	Meeting
Audience:	CFO Data Mart Owners
Purpose:	- Communicate framework
	- Validate framework design
	- Discuss impact of framework on mart
Developer:	Modernization Partner
Presenter:	Project Team
Due Date:	10/24/01
Project Plan Line #:	26

Event: Validation Meeting w/ DL Data Mart Owners

Vehicle:	Meeting
Audience:	DL Data Mart Owners
Purpose:	- Communicate framework
	- Validate framework design
	- Discuss impact of framework on mart
Developer:	Modernization Partner
Presenter:	Project Team
Due Date:	10/25/01
Project Plan Line #:	29

Event: Validation Meeting w/ FP Data Mart Owners

Vehicle:	Meeting
Audience:	FP Data Mart Owners
Purpose:	- Communicate framework
	- Validate framework design
	- Discuss impact of framework on mart
Developer:	Modernization Partner
Presenter:	Project Team
Due Date:	10/29/01
Project Plan Line #:	32

Event: Validation Meeting w/ Credit Management Data Mart Owners

Vehicle: Meeting
Audience: Credit Management Data Mart Owners
Purpose: - Communicate framework
                      - Validate framework design
                      - Discuss impact of framework on mart
Developer: Modernization Partner
Presenter: Project Team
Due Date: 10/30/01
Project Plan Line #: 35

Event: Management Council Presentation Invitation

Vehicle: Email
Audience: Management Council
Purpose: - Announce presentation date
                      - Deliver presentation agenda
                      - Encourage participation
Developer: SFA
Presenter: N/A
Due Date: 11/2/01
Project Plan Line #: 51

Event: Modernization Partner Newsletter (for November)

Vehicle: Project write-up article
Audience: Modernization Partner
Purpose: Communicate high-level status and progress of project
Developer: Modernization Partner
Presenter: N/A
Due Date: 11/15/01
Project Plan Line #: 52

Event: SFA In-Step Article

Vehicle: Project write-up article
Audience: SFA
Purpose: - Provide awareness of data mart integration framework
                      - Communicate high-level project goals, approach, and
                        accomplishments
Developer: Modernization Partner
Presenter: N/A
Due Date: 11/15/01
Project Plan Line #: 53

Event: Presentation with Management Council

Vehicle: Briefing
Audience: Management Council
Purpose: Communicate project accomplishments and benefits
Developer: SFA
Presenter: SFA
Due Date: 11/23/01
Project Plan Line #: 55

Event: Final Briefing Invitation

Vehicle: Email
Audience: Data Mart Owners
Purpose: - Announce briefing date
                      - Deliver briefing agenda
                      - Encourage participation
Developer: Modernization Partner
Presenter: N/A
Due Date: 11/23/01
Project Plan Line #: 56

Event: Final Briefing

Vehicle: Presentation
Audience: Data Mart Owners
Purpose: - Communicate Final Integration Framework Design
                      - Communicate Impact Analysis of Framework Design
                      - Communicate Governance/Review Process
Developer: Modernization Partner
Presenter: Project Team
Due Date: 12/6/01
Project Plan Line #: 59